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FISHERIES OF URUGUAY

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Background.

a. Economic importance of the fishing industry in the economy of the country or region: social and political aspects.

Uruguay has always based its national economy on livestock and agricultural produce, activities which constitute 95 per cent of all Uruguayan exports and which utilize 83 per cent of the country's arable or pasture lands. This does not imply that Uruguay is totally lacking in other sources of natural wealth. Several other resources, not the least of which is fishing, are open to possible exploitation.

The fishing industry in Uruguay, however, is not yet an important factor in the country's economy. In technological development, the industry is still in the elementary stages, although recent renewed activity on the part of SOYP (Servicio Oceanografico y de Pesca) may lead to modernization and subsequent improvement.

The potential importance of the fishing industry does not depend upon a reorientation of the eating habits of the populace, which at present greatly prefers meat to fish, but upon the export possibilities. The exportation of shark livers and other products necessary to the pharmaceutical industry, especially in the preparation of vitamin extracts, is believed to offer the most attractive commercial incentives. Of secondary importance is the more remote possibility of an industry which would process fish for export purposes. Trade

*Clerk and Third Secretary, respectively, at American Embassy, Montevideo, Uruguay. Report No. 92, April 30, 1947.

sources are of the opinion that the scarcity of tin plate in Uruguay would prevent the successful establishment of fish-canning plants.

While the present per capita consumption of fish in Uruguay is low, some authorities believe that a systematic campaign aimed at altering the people's taste could increase consumption to roughly 20,000 metric tons annually. The benefits, in the form of increased meat exports, would be considerable. It is estimated that exports of meat would be increased by 5,000,000 pesos annually and that the Bank of the Republic would profit to the extent of 1,000,000 pesos per year through exchange transactions. Advocates of this plan also point out that freeing more meat for the foreign market would aid both the Frigorifico Nacional and the Bnak of the Republic, which now jointly meet the deficit incurred by supplying meat to the city of Montevideo.

Proper exploitation of the Uruguayan fishing waters, therefore, offers the country and its industrialists many rewards.

b. History of the development of the fishing industry with special notes on wartime developments, if pertinent.

The history of the development of the fishing industry in Uruguay is very brief, for it was not until very recently that it held a place of any importance in the commercial and industrial life of the country. For many years the industry was left to individuals who, using the most primitive methods, caught, sold and distributed fresh fish to the public. Their activities could hardly be termed well-organized or highly-developed commercially. In the last four years the industry has gained in importance with the establishment in Montevideo of certain private concerns which operate a more modern system of fishing and distribution and whose success is a proof of the great latent possibilities of the industry. Another very important factor in the growth of this industry is the attitude of the Uruguayan government, which, through the SOYP, is doing all it can to encourage the consumption of fish and which, when the SOYP is reorganized, will not only conduct a campaign to persuade the Uruguayan people to eat more fish, but will endeavour to utilize the by-products. Fishing as a sport has become increasingly popular during the last few years, there being many clubs which organize competitions and excursions for their members.

The fishing industry, because of the unimportant position it occupied in the Uruguayan economy, suffered little during the war and was able to maintain its normal limited supply and manufacture.

Location.

a. Principal ports or districts.

The following are the principal ports and districts of the fishing industry in Uruguay:

Montevideo	Salto
Punta del Este	Psysandú
La Paloma	Santiago Vażquez
Cabo Polonio	Nueva Palmira
Piriápolis	Colonia
Carmelo	

b. Fishing grounds. The most prolific areas are relatively close to shore in waters less than 200 fathoms.

c. Fresh water fisheries in rivers and lakes.

Apart from the important fishing regions of the River Plate and the Atlantic, i.e. the ports of Montevideo, Piriàpolis, Punta del Este, La Paloma, Cabo Polonio and Colonia, there are less important fresh-water fishing areas such as Salto, Paysandù, Santiago Vázquez, Nueva Palmira and Carmelo. In the south-east region there are seven lakes covering a total surface of from 45 to 55 thousand hectares, to which may ultimately be added the lake formed by the Rio Negro dam at Rincón del Bonete, of which it is estimated that approximately 100,000 hectares are suitable for fishing. The latter is not exploited at present, however,

Employment.

a. Number of workers.

It is believed that some 600 men are engaged in the fishing trade, as fishermen, processors and distributors.

b. Wages received.

The average salary received by workers employed by organized firms in the fishing trade is estimated at 120 pesos (1) per month. Those who work independently may earn somewhat more.

c. Hours of labor and working conditions.

Workers have an eight-hour day, with overtime. Working conditions for the men employed in the fishing trade are precarious, owing to the lack of modern installations. All present equipment, including that used by the SOYP, is badly in need of repair.

d. Subsistence fishing and angling for sport.

Chapter 1, sections a and b, of this report deal with the above.

Fishing Vessels.

a. Number of vessels.

b. Type and size.

c. Power employed.

d. Adequacy of existing vessels and gear to meet demands of industry.

The number of vessels at present engaged in fishing is estimated at 29, the only ones worthy of mention being those belonging to the SOYP, as follows: One steel trawler, the "Antares", of 267 metric tons' displacement, 38 meters in length, coal burning, carrying a crew of 18 men, with refrigerated storage space, purchased in 1938 in England for 100,000 pesos;

(1) Current rate of exchange: U$S 100 equal 178.50 pesos

A second trawler, the "Aldebarán", of 339 metric tons' displacement, 43 meters in length and at present without refrigeration facilities, in bad repair and not in active use, purchased in 1914 for 40,000 pesos from Argentina, built in Great Britain;

One tugboat, the "Altair", of 33 metric tons' displacement 18.8 meters in length, coal burning, with a crew of 16 men. Purchased second-hand in 1937. Most of the crew are employed in operating nets and multiple fish lines from small boats;

One launch, "La Marina", of 7 tons' displacement, 9.7 meters in length, with a crew of 5 men for operation of multiple fish lines, bought in 1937, in need of thorough overhauling.

In addition, other vessels of lesser tonnage, steam or motor, usually in a poor state of repair and the property of private firms. Their value is negligible.

The actual value of the installation and equipment of the fishing industry may be estimated as follows:

Private Firms		
Vessels	164,800 pesos	
Other fishing equipment	19,500 "	
Shore equipment & installations	32,700	217,000 pesos
SOYP		
Vessels	107,000	
Other equipment	5,170	
Manufacturing equipment & installations	151,772	263,942 pesos
Port Authorities		
Dockside installations for the use of amateur fishermen	24,042	24,042
Total		504,984 pesos

Fishing Methods Employed.

a. Inshore and offshore.

Practically all Uruguayan fishing is coastal, that which takes place in the middle of the River Plate being slight as compared with the total.

b. Trawling, line, net trap, etc. (indicate relative importance of each gear, and principal species taken by each).

With the exception of the trawler and of two vessels employing nets all others use hooks and lines. Nets, however, give superior results.

Species. List common or local name, and Latin or scientific names.

Names of fish commonly caught in Uruguayan waters.

(The common name in Spanish is followed by one or more common names in English, as far as they are current in the River Plate region, in brackets).

Common names	Scientific names
Corvina (croaker) (white sea bass)	Micropon undulatus, L. Micropon opercubris, Q.G. Sciaena lepisma. Cynoscio nobile
Pescadilla (sea trout or weak fish)	Cynoscion striatus, Cuv. Urophycis chuss.
Merluza (whiting, hake or false cod)	Merluccius (gayi, Guich. hubbsi, Mar.)
Bagre or mochuelo (cat fish)	Trachysurus barbus, Lacep. Pimelodus claries, L. Rhamdia sapo, C.V.
Corvina negra (sea drum)	Pogonias chromis, L.
Palometa	Parona signata, Jen.
Cazón (shark or dogfish)	Mustelus canis, Mitch.
Congrio (Conger)	Leptocephalus orbignyanus, Val. Percophis brazilianus, Q.C.
Pescadilla de red	Sagenichthys ancylodon, Bloch, Berg.
Gallo	Zenpsis conchifer, Low. Callorhynchus, callorhynchus, L.
Lacha (menhaden)	Brevoortia tyrannus, Latrobe.
Pejerrey (a pseudo mackerel)	Basilichthys bonariensis, C.V. Menidia uruguayensis, Devicenzi Odenthestes perugiai, Everm and Kend.
Pati	Luciopimelodus pati, C.V.
Raya (skate)	Psammobatis microps, Gthr.
Dorado (gilt head)	Salminus maxillosus, Val. Coryphaena. Chrysophrys.
Liśa (mullet)	Mugil braziliensis, Ag.
Armado	Oxydorus kneri, Bloch. Doras granulosus, Val.

Common names	Scientific Names
Lenguado (pseudo halibut or flounder)	Paralichthys (braziliensis, Ranz patagonicus, Jord. and Hoss.
Sargo	Diplodus argenteus, C. V.
Salmón	Brycon orbygnianus, C. V.
Anchoa (bluefish)	Cheilodipterus saltator, L. Engraulis encrasicholus Pomatomus saltatrix
Anguila	Symbranchus marmoratus, Bloch.
Surubí	Pseudoplatystoma coruscans, Ag.
Mangurubú	Pseudopimelodus zungaro, Humb.
Sábalo (shad)	Prochilodus lineatus, Val. Clupea alosa.
Mandubí (manduvi)	Agenciosus uruguayensis, Devicenzi Pseudo agenciosus brevifilis, C. V.
Pacú	Colesoma mitrei, Berg. Colosoma canterai, Devicenzi.
Tararira	Hoplias malabaricus, Bloch.
Boga	Leporinus obtusidenus, Val.
Burriqueta	Ophioscion adustus, Ag.
Pargo Rosado (red porgy or baize)	Pagrus pagrus, L.
Mero	Acanthistius brasilianus, C.V. Epinophelus gigas, Brunn.
Rouget	Helicolenus (dactylopterus lahillei, Norman)
Nata (harvest fish)	Rhombus paru, L.
Burel (young anchovy)	Cheilodipterus saltator, L.
Sardina (sardine)	Clupea encrasicolus Lyncengraulis grossidens, Ag.
Calamares (calomares Squid)	- - - - - - - - - -
Salmerón	Boridia grossidens, C.V.
Centolla	Lithodes antarctica, Homb and Jacq.

Common Names	Scientific Names
Pargo blanco	Umbrina canossi Berg.
Criolla	Pogonias chromis, L.
Congrio real	Percophis brasiliensis, Q.C.
Bacalao del Sur (Abadejo) (like codfish)	Genypterus blacodes, Bloch.
Anchoita (anchovy)	Stolephorus olidus, Gthr.
Anguila	Symbranchus parmoratus, Bloch.
Mojarra	Carax gibbosus, L.

Fish Taken, 1937 to date.

a. Fish landed. Indicate catch by principal species.

According to statistics furnished by SOYP, the total catch for the past nine years, in metric tons, was as follows:

Year	S.O.Y.P.	Private firms	Total
1938	1,347	2,295	3,642
1939	1,372	2,043	3,415
1940	1,187	1,919	3,106
1941	1,286	1,892	3,178
1942	1,222	1,962	3,184
1943	1,343	1,979	3,322
1944	1,252	2,071	3,323
1945	1,301	2,104	3,405
1946	1,269	2,334	3,603

The average annual catch in Uruguay, therefore, was 3,353 metric tons. The percentage thereof, by species, follow:

Corvina	78%
Pescadilla	16
Bagre	1
Brotula	1
Merluza	1
Various	3

b. Fish wasted.

It is estimated that 15% of the total catch is wasted. Part of this is due to the lack of consumer demand for the species in question, part to the lack of adequate refrigeration facilities.

Production and methods of processing, 1937 to date.

Annual production, in its several forms, is given below in terms of metric tons.

Year	Fresh or frozen fillets	Canned	Pickled	Dry salted and smoked
1938	1,858	161	149	928
1939	1,742	150	140	871
1940	1,584	142	122	792
1941	1,621	139	131	810
1942	1,633	141	130	800
1943	1,695	151	131	849
1944	1,735	147	136	807
1945	1,836	108	152	798
1946	2,038	163	143	919

The different species are processed in amounts corresponding roughly to the percentage given in paragraph 7 (a). Tin containers with a net capacity of 280 grams are used. These are delivered in cases of 48 cans each.

Production of By-products.

a. Fish oil.

(1) Total Production - by kind

The production of fish oil is of negligible commercial importance, since the entire annual output, roughly 200 metric tons, is used in the feeding of animals.

(2) Number of mills and type of equipment for primary processing and further refining.

Fish oil production is limited to two small firms. No information with regard to installations is available.

(3) Grades produced.

The oil produced is either Unrefined or Inedible.

(4) Consumption in country - amount by industry, giving edible and inedible separately.

As noted above, only inedible oil, which is entirely consumed in the country, is produced.

b. Fish meal for animal and poultry feed, and for fertilizer.

The production of fish meal in the period 1937-45 is given below.

Year	Kilograms
1937	168,240
1938	215,402
1939	190,072

Year	Kilograms
1940	175,122
1941	167,486
1942	137,126
1943	195,162
1944	277,082
1945	198,917
1946	Not available

c. Other by-products.

The preparation of vitamin extracts has been underway in the local industry for only little more than a year.

Consumption of principal species and total.

a. Fresh or frozen (in metric tons)

Year	Corvina	Pescadilla	Bagre	Brótula	Merluza	Especies Varias	Total
1938	1,449	297	17	21	19	56	1,858
1939	1,359	279	18	19	17	50	1,742
1940	1,235	253	15	18	16	47	1,584
1941	1,264	259	11	23	16	48	1,621
1942	1,273	262	12	19	17	50	1,633
1943	1,322	271	16	21	19	46	1,695
1944	1,353	278	11	25	17	51	1,735
1945	1,432	294	12	26	18	54	1,836
1946	1,589	326	14	28	15	66	2,038

b. Canned.

Year	Corvina	Pescadilla	Merluza	Total
1938	129	17	15	161
1939	120	16	14	150
1940	114	15	13	142
1941	121	11	7	139
1942	130	7	4	141
1943	127	13	11	151
1944	118	20	9	147
1945	89	11	8	108
1946	137	21	5	163

c. Cured. (Pickled, salted, smoked)

Year	Corvine	Pescadilla	Merluza	Total
1938	915	107	55	1,077
1939	885	95	61	1,041
1940	780	120	14	914
1941	846	64	31	941
1942	818	92	20	930

c. Cured. (Cont'd)

Year	Corvina	Pescadilla	Merluza	Total
1943	882	68	30	980
1944	849	81	13	943
1945	855	74	21	950
1946	924	85	53	1,062

d. Indicate pattern of consumption, including customs and prejudices.

The local tastes and habits have developed a consumption pattern which may be expressed by the following percentage table:

Fresh fish, especially fillets	60%
Canned fish	30
Salted fish	10

International trade control and pattern, 1937 to date.

a. Indicate by all breakdowns available for all fishery products and by-products, including country distribution.

(1) Imports.

Total imports of salted fish
(Gross weight, in metric tons)

TYPE	1937	1938	1939	1940	1941	1942	1943	1944	1945	1946
Codfish(1)	163	179	143	235	126	59	22	32	71	98
Anchovies(2)	76	82	61	92	60	85	132	77	78	67
Herring (3)	24	27	20	32	16	4	1	--	4	2

Note 1. Codfish are normally received in tin-lined cans which are estimated to constitute 10 per cent of the gross weight. It is understood that dry and salted codfish are imported only from North America or from Europe.

Note 2. Anchovies are shipped in two types of containers, i.e. in heavy barrels which represent an estimated 40 per cent of gross weight and in tins which represent an estimated 20 per cent of gross weight. Normally 55 per cent of the anchovies imported are in barrels and 45 per cent in tins, and are shipped in a salt solution. All imports of anchovies during 1942, 1943 and 1944 were received from Argentina, and were of a local species differing from the Mediterranean variety.

Note 3. Herring is customarily received in tins which are estimated to constitute 10 per cent of the gross weight.

Total imports of canned fish
(Gross weight, in metric tons)

TYPE	1937	1938	1939	1940	1941	1942	1943	1944	1945	1946
Anchovies	12	53	46	20	40	2	5	2	1	2
Tunny fish	21	19	18	19	15	--	8	43	39	53
Salmon	8	10	7	7	12	5	2	4	5	7
Sardines	230	229	205	139	174	112	10	47	141	137
Others	7	5	6	4	2	1	1	3	2	6

Note. Because of the various forms in which these fish are prepared, it is impossible to estimate the actual net weight of the fish alone.

There are no imports of fresh or frozen fish.

(2) Exports.

There are no exports of fish from Uruguay

b. Foreign competition, including analysis and trends of imports, import tariffs and other regulations.

Foreign competition with the local industry exists only in the cases of canned products in general and dry or brine salt fish, especially those types which are not found in Uruguayan coastal waters, e.g., codfish, sardines, salmon, tuna, and herring. Since the local canning industry is still in an elementary stage of development, it is unable to offer effective quality competition to the imported products. Proponents of the national industry hope that the adoption of modern methods and the accumulation of manufacturing experience will eventually enable the Uruguayan factories to produce canned fish on a par with the at present superior foreign product.

All imports are subject to exchange control. The import tariffs for fish are as follows:

Fresh fish:	79 per cent ad-valorem.
Frozen fish:	12 per cent ad-valorem
Dry salted, smoked and kippered fish	
Herring:	$0.26 (Uruguayan pesos) per 100 kilograms, including container.
Codfish:	
a) Bone-in:	$0.11 (Uruguayan pesos) per kilogram gross weight
b) Boneless:	$0.21 (Uruguayan pesos) perkilogram gross weight
Anchovies:	$0.16 (Uruguayan pesos) per kilogram gross weight
Sardines:	
a) Prensadas:	$0.11 (Uruguayan pesos) per kilogram gross weight
b) In other conditions:	$0.16 (Uruguayan pesos) per kilogram gross weight.
Other species:	$0.16 (Uruguayan pesos) per kilogram gross weight.

Canned fish prepared in different forms or styles, not specified above.

In brine:	$0.42 (Uruguayan pesos) per kilogram including container.
Dry:	$0.14 (Uruguayan pesos) per kilogram including container.
Anchovies in oil:	$0.70 (Uruguayan pesos) per kilogram including container.
Sardines in oil:	$0.44 (Uruguayan pesos) per kilogram including container.
Others:	$0.70 (Uruguayan pesos) per kilogram including container.

All imported foodstuffs are subject to chemical analysis. This safeguard is designed to protect the consumer from impure or tainted food.

c. Other principal factors limiting imports or exports.

There is no law which specifically limits exports or imports of fish as such. However, all international trade is controlled by the Office of Export and Import Control and the Bank of the Republic, which respectively authorize and sell the required foreign exchange.

Prices.

a. Fresh.

Reliable price data are obtainable only from SOYP, the official institute, for the retail trade. Wholesale transactions are completely private, and the prices fluctuate considerably. Large scale provisioning of the various government dependencies such as hospitals, asylums, garrisons, prisons, etc., is effected under official contracts with SOYP, the details of which are not made public.

Retail prices, in Uruguayan pesos per net kilo, are as follows:

Corvina	$0.17
Pescadilla	0.17
Merluza	0.20
Sargo	0.36
Lenguado	0.36
Pejerrey	0.40
Besugo	0.45
Brótula	0.45
Anchoa	0.45

Fillets of fish with or without bones, from 0.34 to 0.42 centésimos.

b. Canned.
c. Pickled and salted.
d. Smoked and kippered.
e. Other products

As previously noted, all prepared fish, with the exception of a minute quantity produced locally is imported. Both the wholesale and retail prices of the latter vary enormously because of factors such as size, quality, style of preparation, country of origin, location of the store, etc. As a result, it is not unusual to find the same product being offered at radically different prices at the same time.

Internal Trade Pattern.

a. Methods of marketing and channels of trade in internal market, including factors affecting marketing such as taxes, price and marketing agreements, etc.

The retail fish trade is largely carried on at the stands located in the public markets. SOYP maintains seven branches in various zones of Montevideo, and privately-owned enterprises are also found in the markets. In addition, a large number of peddlers hawk their wares in thestreets of the residential districts.

With regard to taxes, the peddlers are required to pay for the appropriate permit and the stands are subject to the usual commercial taxes and patents. There are no known price or marketing agreements, although prices in general reflect those of SOYP, which were given in paragraph 12 (b) of this report.

b. Measures in effect or under consideration for relieving disturbed market conditions, including domestic subsidies, production control, etc.

The only official steps taken toward guaranteeing an ample supply of fish at moderate prices were those embodied in the reorganization of SOYP, the official government entity. SOYP has authorized a comprehensive study of supply controls, possible extension of sales, new installations and other factors pertinent to the aims noted above.

c. Improvements in technology, organization, financing, etc.

Aside from the study mentioned in the preceding paragraph, no such improvements have been noted.

d. Markets and effective demand.

Exports of canned fish and by-products have been so small as to be negligible. The present market and effective demand is almost completely domestic, although future export possibilities are limited only by the energy and the imagination with which the industry is developed.

Fishery Research

a. Fishing statistics.

No other statistics are available.

b. Biological.
c. Technological.
d. Sociological and economic
e. Nutritional.
f. Pond culture and fertilization.
g. Stocking and rehabilitation of fisheries in lakes and streams
h. Fishery education
i. Intensification of existing areas.
j. Greater utilization of present catch.

Outlook Summary.

a. Production.

The annual catch in Uruguay averages 3,000 metric tons, 60% of which is attributable to SOYP and 40% to private enterprises. Production varies seasonally with the emigration of fish; the peak months are April and July. As indicated above, the present production is closely correlated to local demand, which is not great.

Anticipating an increase in demand in the future, SOYP has developed a plan which is composed of the following elements:

Establishment of new and more efficient stands for public sale;
Experimental fishing on the Bank of Rouen, 168 miles south of Montevideo, an area which has not yet been tested;
Exploratory fresh water fishing in the Uruguay river;
Studies designed to determine the possibilities of extracting

lobsters, clams and other shell-fish on the East Coast;
A proposed State fishing base in the port of La Paloma, with plants for the production of flour, canned fish, etc.

If the above enterprises fulfill expectations, it is estimated by SOYP that the annual production will increase to 10,000 metric tons within two years.

The phase of the fisheries industry with the greatest commercial possibilities is the extraction of vitamin oils from shark and other fish livers. Research in this respect was begun in 1939 by SOYP and the Institute of Industrial Chemistry. As a result of the subsequent report, SOYP began laboratory extraction on a small scale in 1941. The small output was used, with satisfactory results, by the Ministry of Public Health. Now SOYP has some modern machinery, including two centrifuges and a mill. Delivery of a spectrofotometer is expected shortly. However, present production is extremely limited. The new plant of SOYP is not expected to operate at capacity for at least six months.

The chief vitamin oil-bearing fish is the "tiburón chico" (mustelus cannis-Mitch) but other less profitable species are also being exploited. The former is found on the continental shelf between Punta del Este and the Chuy.

Principal drawback to proper exploitation of this industry has been the lack of suitable vessels. SOYP acquired five new vessels in the past year. Furthermore, SOYP has announced that its new plant will be available to all fishermen in order that the yield of oils be as large as possible. For this service SOYP will receive a royalty on each liter of oil obtained or each kilo of liver processed.

Upon recommendation of Dr. Fernando DE BUEN, a Spanish fish industry specialist, a total of 49,000 pesos were allocated for the reconstruction of buildings and installations on the Isla de Lobos, headquarters of the sea wolf skin industry. The value of this commodity to Uruguay has declined steadily since 1910, when several private concerns took over the then thriving trade. SOYP hopes that by improvement in quality approximately 7,000 skins can be sold annually.

b. Effective local demand.

The effective local demand is somewhat less than might be expected of a country with abundant fish resources, because the population traditionally prefers meat to fish. A recent increase in consumption was due to a shortage of the former and, to a lesser degree, to the efforts of interested parties in educating the public as to the dietary benefits of fish.

c. Import Requirements.

Imports are confined to canned products, since the country is self-sufficient with respect to fresh fish. As noted above in the description of the local industry, some progress in the establishment of fish-processing and fish-canning factories is being made. However, it is anticipated that for several years to come canned products will continue to be imported, although in gradually decreasing quantities.

d. Exportable Surpluses.

At the present time Uruguay has no exportable surplus because local production is completely absorbed by the internal market. But in the future, it is hoped that an expanded industry will be able to export Uruguay's fish and fish products.

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